APPENDIX A

Frequently Asked Questions

Appendix Objectives

In this appendix, we will list the questions most commonly asked by CalTOP users, and the answers to those questions.

A. Client-related Questions

B. Form-related Questions

C. Report-related Questions

D. Data-related Questions

E. Security-related Questions

A. Client-related Questions

The following are commonly asked questions about entering and modifying client records.

How does CalTOP help prevent duplicate client entry?

CalTOP checks for potential client matches by looking at several key fields in the client identifying information section. To help further identify a client, CalTOP examines additional client information called client confirmatory elements. The confirmatory elements are:

- Social Security number (SSN)
- California Department of Corrections number (CDC)
- ZIP code of current residence

The Client Find list displays potential client matches when you are entering new client information. From this list, you may view client information to determine whether the client you are attempting to add already exists in CalTOP.

How can I search for a client?

Use the Client Information pages to determine whether a client exists in the CalTOP database. There are three ways to bring up client information: using the CalTOP Client ID, File Number ID or the client's identifying and confirmatory information.

What if I accidentally delete a client record? Can I get that information back?

No. If you do delete a client, you can re-establish the client by re-keying client information. There is not an "undo" delete function. When the client is re-established, a new CalTOP Client ID will be assigned.

You can only delete a client if he/she does not have any transactions (forms) logged for him/her. For example, you could not delete a client if that client had a contact or admission recorded in the system.

Can I enter data for a client entered by another provider?

Yes. In fact, you should use the existing client data whenever possible. This minimizes duplication of client records on the system.

B. Form-related Questions

The following are commonly asked questions regarding CalTOP forms.

How can I see what transactions a client has?

The Transaction Detail List displays a list of transactions for a client. For instructions on accessing the Transaction List Detail page, see “Accessing the Transaction List Pages” on page 38.

Does CalTOP prevent me from entering the exact same information for the same client on the same form?

No. CalTOP accepts records containing the same data.

What if I inadvertently enter data for the same record more than once?

You may delete the record that you entered. For instructions on deleting records, see “Deleting Records” on page 81.

Can records be entered in any order?

You may enter forms in any order except for an *Episode Status Change* form. Before you can enter the *Episode Status Change* record, there must be an *Admission* or a *Treatment* already recorded in the database. If you record a *Treatment* or *ASAM/PPC II* transaction before an *Admission*, the date of the admission must be on or before the date of the earliest *ASAM/PPC II* or *Treatment* record.

Can I update or delete records?

You may update or delete forms that you have entered.

What if I don’t have all the data I need to submit a record? Can the information be saved?

You may save a “Working Copy” of the record if you don’t have all the information you need to complete the form. For instructions on saving working copies of records, see “Submitting Records and Saving Working Copies” on page78.

C. Report-related Questions

The following are commonly asked questions related to the reporting functions in CalTOP.

Does the application offer reports?

CalTOP offers management statistics reports for both Web transactions and batch transactions. These reports are viewable online through the Reporting function. You can also view a client’s transactions through the Transaction Detail List page.

Can anyone view these reports?

You may access all the reports currently available through the Reporting function, however you can only view reports for data entered through your provider profile.

D. Data-related Questions

The following are commonly asked questions regarding entering data in CalTOP.

How long is the data kept in the database?

With the exception of working copies, the data is kept in the database forever. Working copies will remain in the database for a limited time.

What if data needs to be updated once it has been sent to the State?

You may update most data via the Web. The only data that you may not currently update via the Web is admission information in ASI TOPPS II or Admission ASI Lite transactions submitted via batch. To update ASI TOPPS II data, you must delete the transaction recorded in CalTOP and resubmit the information in its entirety.

E. Security-related Questions

The following are questions commonly asked about security issues in CalTOP.

Can someone else view/update/delete data that has been entered by me?

A person may only access data associated with his/her Provider Profile established at login. If a person is entering data for the same provider that you entered data for, he/she may view/update/delete that data. For example, you entered a *Treatment* record for provider Jones. Someone else may update the *Treatment* record as long as he/she was also authorized to enter data for provider Jones.

Will forms entered by another person show up on my screen?

You may view/update/delete records that someone else has entered if you have the security rights to do so (see previous question for further detail). CalTOP produces the Transaction Detail List for the client. This list shows a summary of all records and working copies entered for the client, regardless of which provider keyed the data. However, you may only view/update/delete a specific form if you have the security rights to do so.